

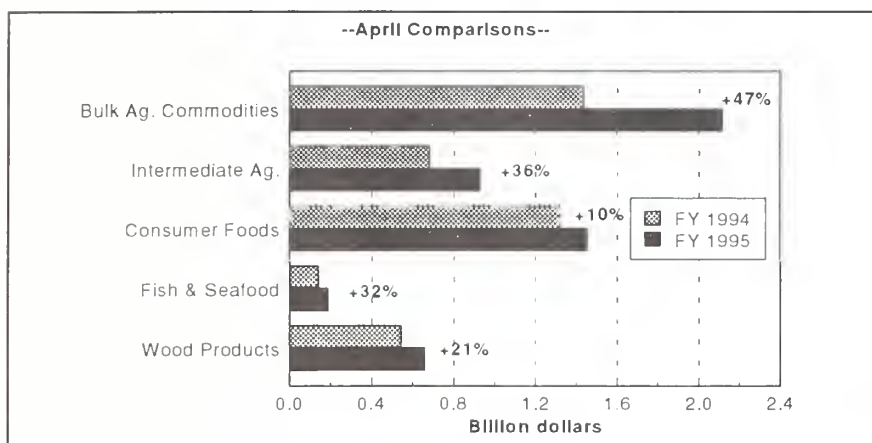
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Agricultural Trade Highlights

Exports Up 29 Percent in April *Bulk Commodities Continue to Lead Growth*



The latest U.S. trade statistics released on June 21 confirm that exports of U.S. agricultural, fish and forest products remain on a strong upward growth curve. In April, the value of their combined exports totaled \$5.4 billion, 29-percent higher than the April 1994 level. Agricultural exports alone totaled \$4.5 billion, up 31 percent over year-ago levels with all three categories continuing to register double-digit gains. Fish and forest product exports totaled \$854 million in April, up 23-percent over the same month last year.

April shipments brought U.S. exports of agricultural, fish and forest products to \$38.8 billion for the first seven months of fiscal 1995. This represents a 22-percent increase over the same period last year which ended in a record \$53.3 billion. Agricultural products remained the best performers. Agricultural sales were up 24 percent over the same period last year to \$32.9 billion. U.S. fish and forest product exports reached \$5.9 billion, up 8 percent from the same period last year.

At \$2.1 billion in April, U.S. exports of *bulk commodities* were up 47 percent from the same month last year. April marks the beginning of the

seasonal decline in shipments with exports down 11 percent from the March level. Returning to year-over-year comparisons, six of the nine commodity groups rose with the largest gains recorded for soybeans, cotton and coarse grains. During the first seven months of fiscal 1995, bulk commodity exports totaled \$15.3 billion, up 31 percent over the same period last year with all commodity groups registering gains.

U.S. exports of *intermediate products* reached \$933 million in April, up 36 percent over the same month last year. Year-over-year gains were broad-based with ten of the 11 product groups registering increases. Soybean oil, other vegetable oils, and soybean meal recorded the largest gains. For the first seven months of fiscal 1995, intermediate product exports were up 24 percent to \$7 billion and are solidly positioned to achieve a new record high this year.

U.S. exports of *consumer-oriented products* continued to rise in April. Sales totaled \$1.5 billion, representing a 10-percent increase over the same month last year. Gains were broad-based, with exports rising in 11 of 16

product categories. The largest value increases were recorded by poultry meat and fresh vegetables. April's performance brought consumer food exports during the first seven months of fiscal 1995 to \$10.6 billion, up 16 percent over the same period last year. Consumer foods are headed for a new record high, with exports likely to exceed \$18 billion.

At \$191 million in April, U.S. *edible fish and seafood* exports rose 32 percent over the same month last year. Gains were broad-based, with the largest increases recorded by lobster, roe and urchin. U.S. fish and seafood exports finished the first seven months of fiscal 1995 at \$1.6 billion, up 8 percent over the same period last year.

U.S. *forest product* exports rose to \$663 million in April, up 21 percent from the same month last year. Export value increases were recorded in all four product groups, with logs and lumber accounting for most of the gain. During the first seven months of fiscal 1995, forest product exports rose 8 percent over year-ago levels to reach \$4.3 billion.

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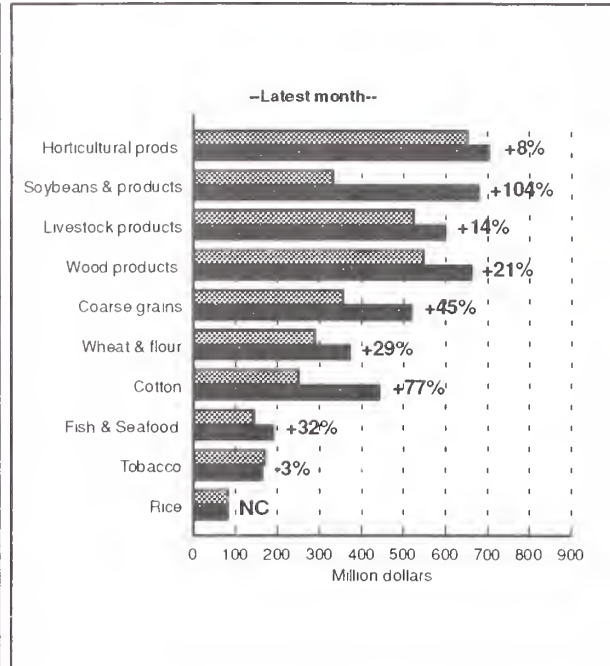
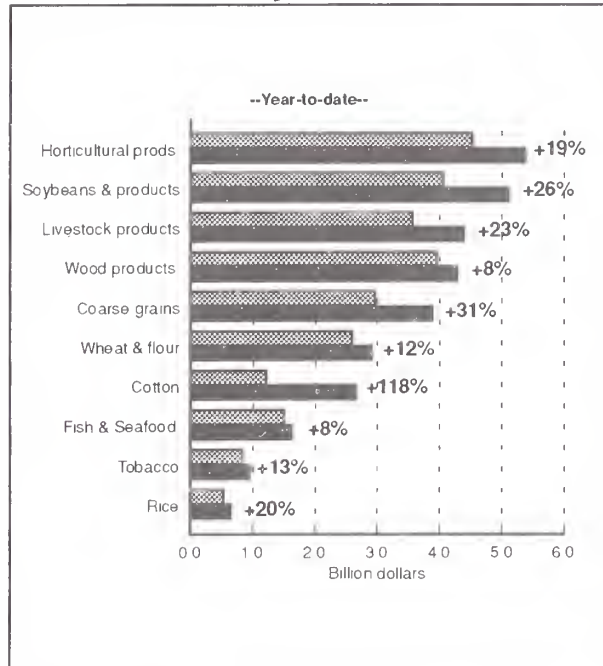
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U.S. Agricultural, Fish and Wood Export Summaries

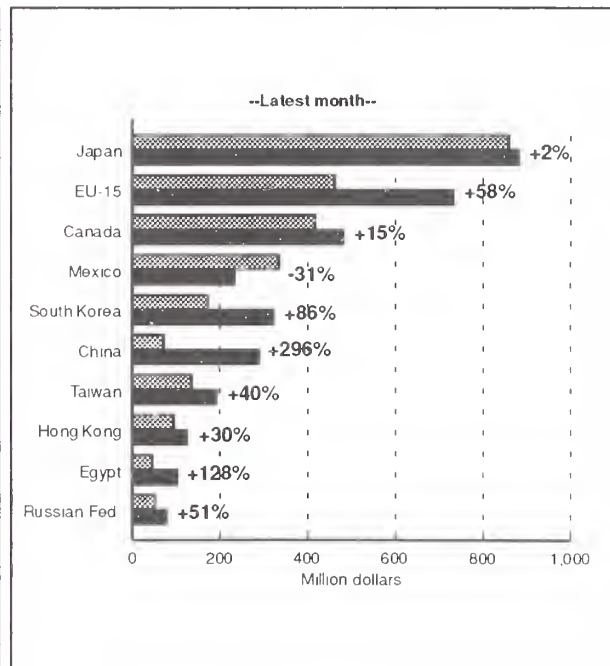
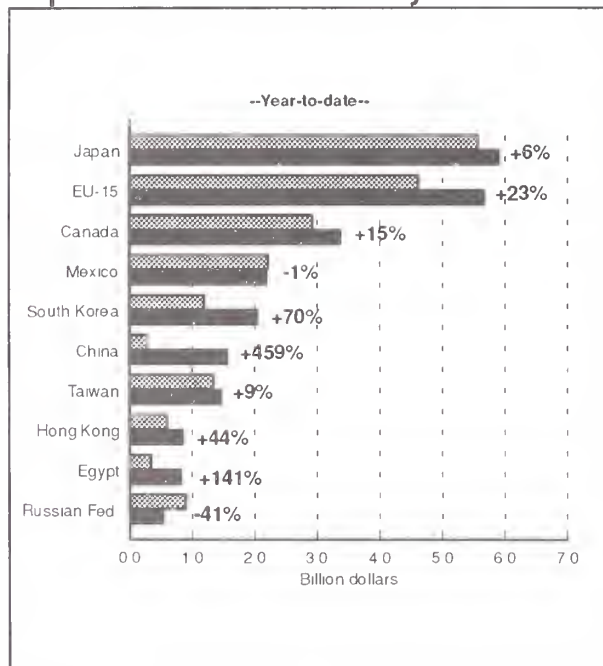
October-April and Latest Month Comparisons

FY '94 FY '95

Product Summary



Top Ten Markets Summary



Note: Percentages are computed as the change from a year ago.

Consumer Food Highlights

U.S. consumer food exports totaled \$5.7 billion for the first four months of calendar 1995, an increase of 13 percent compared to the same period last year. Five of the 16 consumer food categories grew at rates higher than 20 percent: wine & beer, fresh vegetables, processed fruit & vegetables, fruit & vegetable juices, and poultry meats.

U.S. shipments of *chilled and frozen red meats* in the first four months of 1995 reached \$1.2 billion, a 17 percent increase over the same period last year. Shipments going to the Russian Federation increased by \$52 million over the same period last year, a five fold rise which accounts for nearly 30 percent of the total increase for this category. The impact of the peso devaluation and reduced middle class buying power continues to negatively effect U.S. red meat shipments to Mexico. Compared to the same period last year, shipments to Mexico have fallen 51 percent.

U.S. *fresh fruit* exports totaled \$558.3 million during the first four months of 1995, four percent ahead of last year at this time. Sales to Japan rose 18 percent to \$180 million in the first four months of 1995. Canada, the second largest market, had a four percent decline in sales compared to the same four months of 1994. In the EU-15, exports were up 16 percent (large gains in the Netherlands, Germany, and the U.K.). Sales to Mexico declined 60 percent to \$23.8 million compared to the same period last year.

Exports of *processed fruit & vegetables* were 20 percent higher for the first four months of 1995 compared to the same period in 1994. Seven of the ten leading markets (the U.K., Hong Kong, Germany, Korea, Netherlands, Taiwan, and Singapore) had greater than 20 percent growth over the same four month period last year. Brazil grew by 473 percent over last year, reaching a record level of \$7 million.

Exports of U.S. *dairy products* were \$246 million during the first four months of 1995, four percent lower than the first four months of 1994. Exports to Mexico, the largest market

for dairy products, totaled \$25.7 million, a 65 percent decrease compared to the same time last year. However, stronger sales to countries in North Africa and South America helped to reduce the overall decline for this category. In North Africa, Algeria was the leading market with a 98 percent increase, representing a gain of \$22.9 for the first four months of 1994. In South America, Brazil was the fastest growing market for the first four months of 1995 with sales increasing from \$0.2 million in 1994 to \$5.2 million.

U.S. exports of *breakfast cereals* and pancake mix were 4 percent lower in the first four months of 1995 compared to last year, totaling \$86.1 million. Exports to Canada, the largest market, remained nearly the same for the first four months in 1995 compared to last year. Japan and Mexico had declines of 42 and 48 percent respectively, with declines totaling \$12.7 million. However, shipments to Sub Saharan Africa set a record export level totaling \$5.2 million for the first four months of 1995.

U.S. exports of *eggs & products* were unchanged for the four month period in 1995 compared to 1994. Sales to Japan increased to \$12.6 million, a 45 percent gain compared to the first four months of 1994. This gain, however, was mostly offset by a decline in shipments to Canada.

U.S. *fruit and vegetable juice* exports totaled \$221 million for the first four months of 1995, a 40 percent increase compared to the same period in 1994. Triple digit growth in exports to the EU-15 will likely lead to record export levels for this category in 1995. U.S. exports of fruit and vegetable juice to the EU-15 increased to \$51.4 million

for the first four months of 1995. The Netherlands increased to \$21.6 million, a level that already exceeds the 1994 year end total. Double digit growth occurred in the top two export markets, Canada and Japan. Exports to Canada and Japan rose to \$64 million and \$49 million respectively, during the last four months of calendar 1995.

U.S. exports of *tree nuts* totaled \$320 million, an overall decline of 5.9 percent compared to the same four months of 1994. Exports to Spain increased to \$25 million, an 88 percent increase over the same four months of last year. Effects of India's recent trade liberalization for tree nut imports continue to improve sales opportunities for U.S. almond exporters. U.S. exports to India increased to \$11.2 million for the first four months of 1995, a 248 percent increase over the same period in 1994. Exports to Canada, the EU-15, and Japan declined, thus pulling overall U.S. exports of tree nuts down compared to the same period last year.

U.S. shipments of *prepared and preserved red meats* for the first four months of 1995 were \$75.3 million, roughly equal to the same four month level in 1994. Shipments to the Russian Federation totaled \$10 million, a 73 percent increase compared to the same four month period in 1994. Shipments to Mexico fell 52 percent to \$8.7 million for the first four months in 1995 compared to the same period last year. The decline in Mexico reflects a continuing economic impact of the peso devaluation.

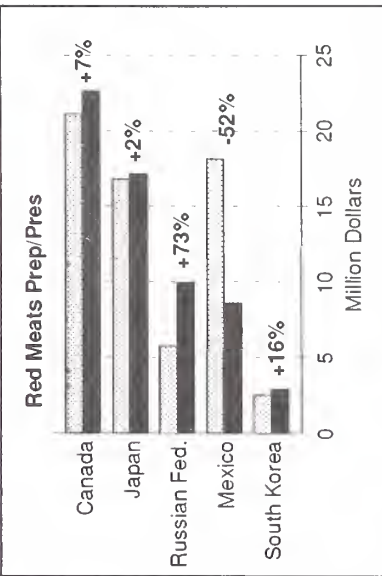
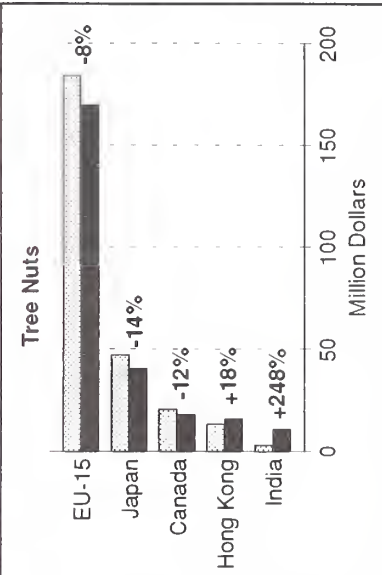
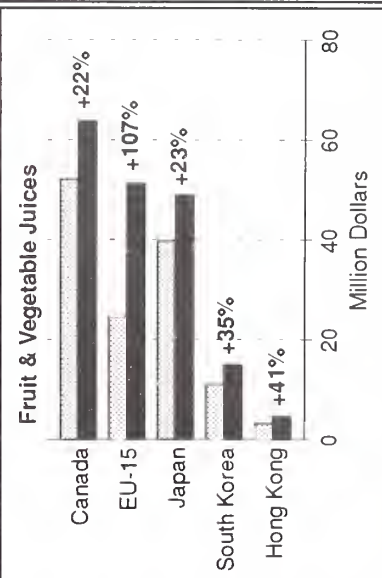
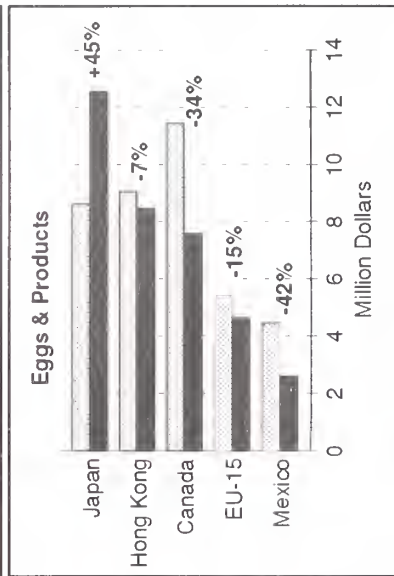
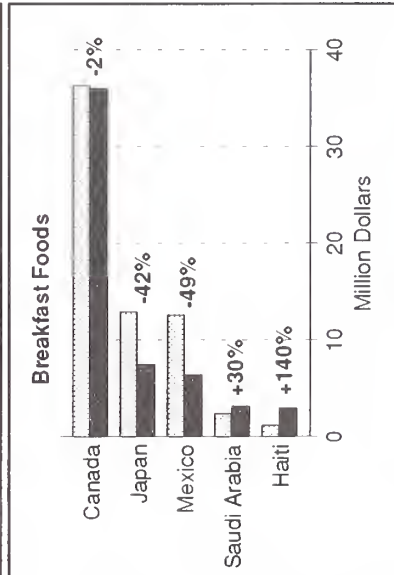
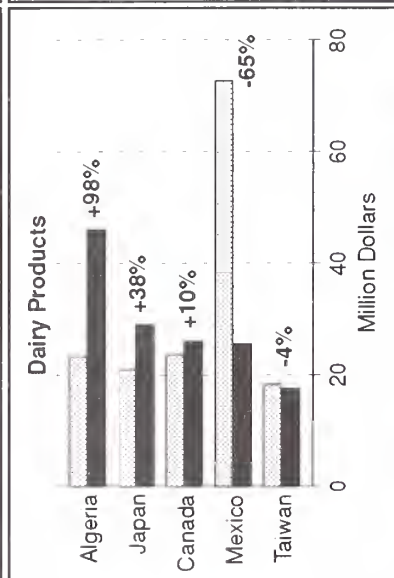
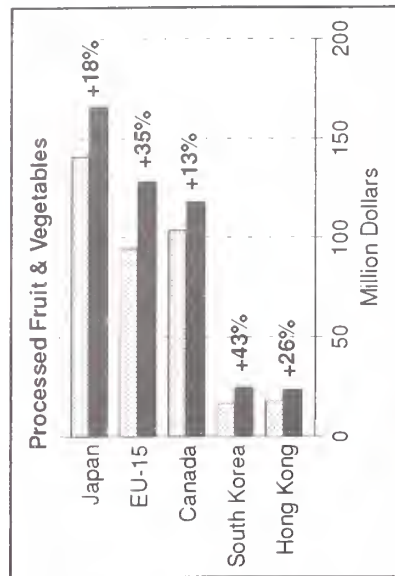
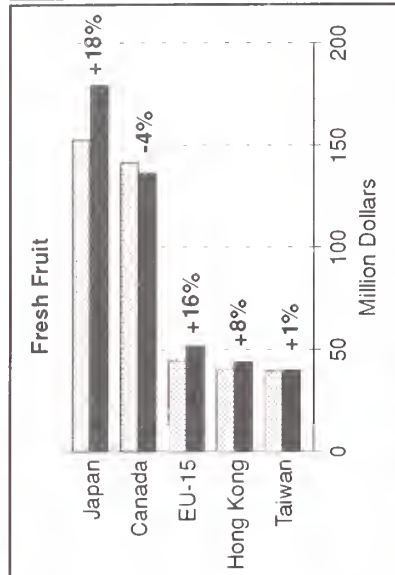
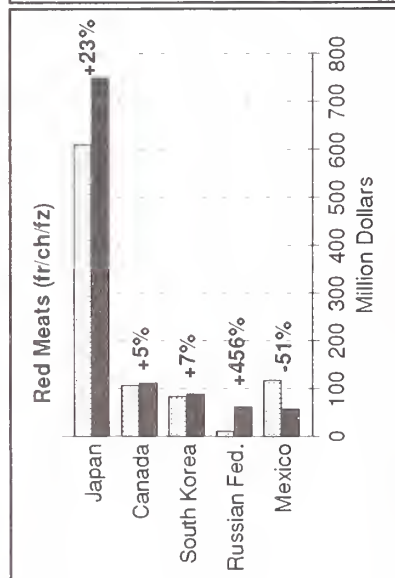
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Top Five Markets for Selected U.S. Consumer Foods

January Through April Comparisons

CY '94

CY '95



Notes: Percentages are computed as the change from 1994 to 1995. Countries are ranked from highest to lowest based on CY 1995 exports.

Product Spotlight: Apples

Worldwide trends towards healthier eating and falling trade barriers in significant markets have combined to make apples an important consumer food export for the United States. Continuous marketing efforts in Taiwan have resulted in U.S. market domination. Indonesia and Thailand have appeared as the bright, new stars in Asia, while a carefully planned marketing effort by the Washington Apple Commission has yielded a fruitful beginning for sales in Japan. U.S. producers have clearly established themselves as the high quality apple supplier throughout the world.

By Carmi Lyon

U.S. apple exports hit an all-time high of \$432 million in 1994, double 1990 levels. Apple exports in the first four months of 1995 are down only slightly compared to 1994 despite a drastic decline in Mexican sales. January to April export figures put U.S. apple sales at \$137 million, down 5 percent. Exports to Mexico for the first four months of 1995 are down \$29 million compared to 1994 due to the higher price of U.S. apples caused by the peso devaluation. In other parts of the world however, U.S. apples sales are thriving.

U.S. Apples on Top of the World

The United States has catapulted to the top of world apple trade. U.S. apple exports have experienced explosive growth, increasing from \$108 million in

1986 to \$319 million in 1993 (from FAO data). U.S. market share grew as well, from 13 percent in 1986 to 25 percent in 1993. The only other nation to maintain steady and positive growth during this period was New Zealand, who held 14 percent of the market in 1993, up from 7 percent in 1986.

Other significant players in world apple trade include Chile, South Africa, the EU, and Argentina. China is emerging as an important player, exporting \$48 million in apples in 1993. At this time however, Chinese production and distribution systems limit the country's ability to export on a wide scale.

Hungary could also become a significant supplier of apples once privatization and land redistribution

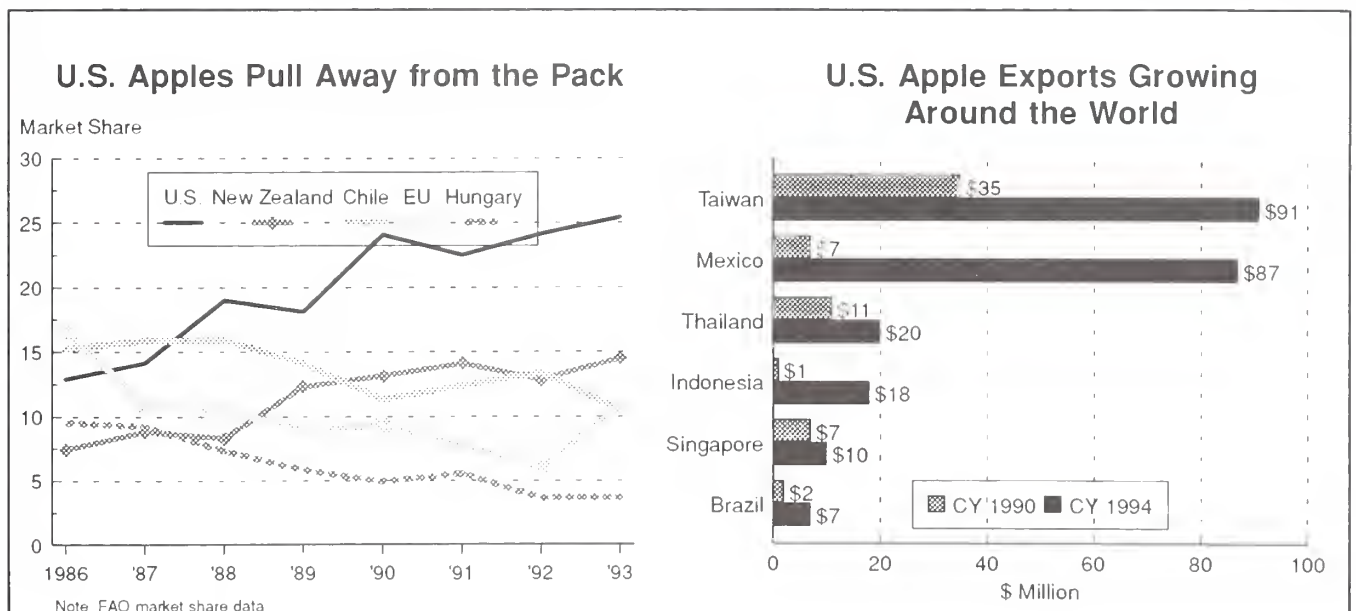
issues are resolved. Hungary fell from the fourth largest apple exporter in 1986, selling \$79 million, to eighth in 1993 with only \$46 million in sales.

Strong Demand Growth in Pacific Rim

U.S. apples have made significant inroads into many Pacific Rim markets, tapping the newly forming bourgeois in these nations. Taiwan represents the shining example of U.S. apple exporters' abilities to identify and develop lucrative markets. In 1993, Taiwan was the fourth largest importer of apples in the world (FAO data), up from tenth place in 1986. The United States has traditionally been the primary apple supplier, capturing about 90 percent of the market.

Taiwan was one of the first overseas markets for U.S. apples. From an initial push in 1979 U.S. sales have nearly tripled to over \$90 million in 1994. Taiwan is now the number one export market for the United States. As per capita incomes have risen, so has the demand for U.S. apples.

U.S. exporters are approaching a turning point as the Taiwanese market evolves from a growth market into a mature market. Taiwanese consumers require a higher quality, more evenly



sized apple than the market of ten years ago. Consumer trends also point to more expensive varieties such as the Fuji and the Gala. The price of the Red Delicious variety has dropped drastically reflecting this shift in demand.

Fortunately for the U.S. exporter, other markets are emerging to replace the growth potential once seen in Taiwan. The Indonesian market has exploded in recent years. In 1990, apple sales to Indonesia were \$1.4 million, but by 1994, exports reached a record \$18 million. Thus far in 1995 Indonesia has been the fastest growing market in Southeast Asia. The market has grown to \$9 million in the first four months of this year, a record breaking pace with a 110 percent increase over 1994 sales. The importance of the Indonesian market will only increase as incomes continue to rise. The Thai apple market has experienced growth similar to Indonesia. Exports to Thailand so far in 1995 are up 39 percent from 1994.

China may also be a potential market, although in the long run they stand to be a formidable competitor. U.S. apples are attractive to the growing middle class, a difficult group to quantify but considered significant.

Imports of U.S. apples have begun only recently from designated orchards and specific packing facilities in Washington. Market access talks in 1995 have expanded the protocol of Washington apples to Oregon and Idaho and have increased the number of ports eligible to receive apples to include Xiamen, Fuzhou, and Nanjing. Official 1994 U.S. apple trade with China was approximately \$300,000. Hong Kong's official 1994 re-export statistics indicate that approximately \$4 million moves through part of Hong Kong into Southern China.

The Russian Far East and Vietnam represent two other markets with strong potential in the future. Russian families have come to the apple growing regions of Washington to sell Russian artifacts and handicrafts. They are using the hard cash earned from these enterprises

to buy apples, which are sent mainly to Vladivostok. Many varieties, including Red Delicious, Golden Delicious, Winesaps, and Romes are going to Russia in a wide range of sizes. With loosening trade restrictions and the potential for a middle class explosion, the 65 million citizens of Vietnam also represent a significant long run market.

Japanese Find the Reds Delicious

With the January opening of the Japanese market to the Washington apple, Japan has become one of the most important emerging markets in the Pacific Rim. Consumer reaction to the Washington apple was positive despite initial concerns about the apple's taste, appearance, and acceptance. Traditionally apples are considered a gift item or an after dinner desert. Consumers prefer a large apple that is sliced and eaten by the entire family. The Fuji is the variety of choice, a sweeter tasting apple than the Red Delicious. In fact, a distant Japanese cousin of the Red Delicious was once grown in Japan but has since disappeared because the variety was perceived as mushy.

Well aware of these facts, the U.S. industry positioned the Washington Red Delicious as distinctive, with a unique taste and a different way of eating. Early promotions in Japan encouraged consumers to eat apples out of hand and through the skin, out of character in this culture. The promotions encouraged consumers to view apples as a healthful food to be eaten at any time. Many Japanese consumers have stated price as a major constraint towards increasing consumption of apples. Exporters expect their lower priced apples to encourage more frequent purchases and a gradual incorporation into the Japanese diet.

Washington apples sold more quickly than expected. Some supermarkets had to raise prices in order to maintain stock for their displays while awaiting the next round of shipments. Through April, U.S. growers have sold \$5.3 million in Japan. Despite complaints of

slim margins, exporters remain optimistic that this initial push into the market will pave the way for many more years of success. Long term market success may lie in the Fuji, a variety more in line with Japanese tastes. But for now, U.S. growers may only sell the Red Delicious variety in Japan. The approval of U.S. Fuji apples is probably two or three more years away.

Market Potential Stretches Across the World

U.S. apples have forged into markets outside of the Pacific Rim as well. Mexico has been an important customer and will continue to be once the economy has rebounded. Although the first four months showed a 62-percent decline from last year's record \$87 million in sales, stabilization of the peso has given importers confidence that they will be able to pay for the apples. Sales should not drop as drastically as the during first third of the year.

Supply conditions have been favorable for U.S. sales in Brazil and Israel. Both nations have only recently allowed access for U.S. apples. Increased exports to Brazil reflect positive economic expansion, government encouragement of imports and poor crops from other apple supplying nations. Israel recently granted access for Washington apples; exports reached \$4 million through April 1995. Potential in this market will depend on U.S. efforts to maintain an open market if Israel's production returns to normal.

U.S. apple growers have developed a product known the world over and sales reflect this market position. The growth markets of Asia and falling trade barriers in other parts of the world can only mean continued success for this all-American fruit.

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Trade Policy and Market Updates

Indonesia's Livestock Industry Growing Rapidly; Protein Import Mix Changing

Indonesia's demand for livestock feed is increasing 10 percent per year and the use of soybean meal in prepared feed rations is increasing even more rapidly. The expansion of soybean meal use is expected to accelerate even more now that Indonesia has announced plans to liberalize soybean meal imports by terminating the monopoly granted to Sarpindo for soybean meal production.

In CY 1994, the United States had a 40 percent share of Indonesia's \$200 million soybean import market, but only 3 percent of the \$130 million soybean meal import market. The planned liberalization by Indonesia may result in lower priced soybean meal from India and South America displacing U.S. soybeans.

Thailand's Expanding Meal Demand and Quota Likely to Benefit U.S. Soybean Meal Exports

Thailand's poultry industry is struggling to maintain its competitiveness in the domestic market. Its role as a poultry exporter, is contingent upon further liberalization of soybean meal imports which will benefit U.S. exports. On June 14, 1995, Thailand's food policy committee announced that an additional 100,000 tons of soybean meal will be allowed to be imported this year under the 15 percent applied-rate duty scheme. The Government of Thailand has already approved 455,000 tons of soybean meal. Thailand has committed in the Uruguay Round to raise its initial soybean meal quota of 219,580 tons to 230,559 tons by the year 2004. The maximum duty on this quota was bound at 20 percent. Imports exceeding those that come under the special low-tariff rate face an applied duty of 119 percent. This expansion of the low-duty authorized import quota will expand opportunities for U.S. soybean meal exports.

Japan to Impose Anti-Dumping Duties on Pakistani Cotton Yarn

The Japanese Ministry of International Trade and Industry and the Ministry of Finance announced their intention to impose anti-dumping duties on cotton yarn imports from Pakistan for a period of up to five years. The decision comes as a result of recent investigations requested by the Japanese spinning industry due to the rapid increase in Pakistani carded cotton yarn imports. Both ministries are expected to reach a final decision on duty levels in August. The maximum duty applicable is expected to be around 10 percent. This action should support the Japanese spinning industry which has experienced a decline in cotton spinning. The U.S. stands to benefit from a healthier Japanese spinning industry, as Japan historically has been one of the largest markets for U.S. cotton exports. As of July 13, 1995, U.S. export commitments to Japan in the 1994/95 (August-July) marketing year stand at 1.3 million bales, 12 percent of total export commitments.

U.S. Pork Exports to Korea Increased Sharply in the First Quarter

In the first quarter of 1995, U.S. pork exporters are experiencing success in penetrating the Korean market. The U.S. share of Korea's pork imports during the first quarter of 1995 rose to 34 percent while Denmark's share fell by 50 percent. According to the latest industry data, Korea imported 30,810 metric tons of pork in the January - March 1995 period, an increase of 516 percent over the same period last year. U.S. exporters supplied 9,810 tons, one third of Korea's total pork imports, a 32 percent increase in U.S. pork exports compared to the same period last year.

...Trade Policy and Market Updates

Brazil Drops Investigation On Canadian Wheat Subsidies

Brazil has closed its investigation into Canadian wheat subsidies without imposing any countervailing duty. Brazilian authorities determined that Canadian wheat did not injure domestic production, because: (1) it was used as a "complement" for blending with inferior domestic wheat at a time of low domestic production, (2) the Canadian share of the import market remained stable during the time period investigated with Canadian prices above Brazilian domestic levels, and (3) the Canadian Government provided incentives to all its wheat producers, (rather than exclusively to exports).

Commerce Announces Final Dumping Margins for Thai Canned Pineapple

The Commerce Department's International Trade Administration (ITA) recently announced final dumping margins, intended to raise the import price to a "fair value", for canned pineapple from Thailand. The Maui Pineapple Company and the International Longshoremen's and Warehousemen's Union petitioned for the investigation, which covered the January-June 1994 period. ITA's final dumping margins vary, depending on the production source, and range from 1.73 percent to 51.16 percent. The U.S. Customs Service has been collecting and holding in bond preliminary dumping margins on canned pineapple from Thailand since January 1995. As of June 5, Customs began assessing the final dumping margins on Thai product. On a related matter, the International Trade Commission (ITC) will decide by the last week of July whether imports of canned pineapple from Thailand damage the domestic U.S. canned pineapple industry. Should the ITC make an affirmative determination, Customs will continue to assess the final dumping margins and keep all money collected prior to the July release of the ITC report. FAS Bangkok is assisting the ITC by gathering requested data on exports and wholesale prices of Thai canned pineapple.

Russian Federation to Allow U.S. Fresh Pork Imports for Retail Sale

As part of the U.S./Russian Bilateral Protocol negotiated in February 1995, the Russian Federation agreed to allow imports of fresh pork packaged for retail sale, provided each hog carcass tests negative for trichina prior to processing. FSIS recently developed an official inspection certificate for this purpose and will be presenting it to Russian vet authorities for approval. All necessary documents and government requirements are expected to be in place for shipments to begin as early as August.

Philippines Suspends Excessive "Home Consumption" Valuation Scheme for U.S. Horticultural Exports

On June 5, 1995, the Government of the Philippines officially suspended its recent order requiring Home Consumption Valuation (HCV) and inspection for fresh fruits and fresh, chilled, and frozen foods. This action is positive news for continued growth in U.S. exports of horticultural products to the Philippines, which totaled \$45 million in 1994, up from \$29 million the previous year. Specifically, exports in 1994 were valued at \$10 million for grapes, \$8 million for apples, \$7 million for frozen french fries, and \$3.5 million for oranges. The HCV system was designed to eliminate the problem of under-invoicing by traders to minimize, for example, the 50 percent duty on imported fruit. Under the HCV system, the Philippine government contracts with Societe Generale de Surveillance (SGS), a private Swiss company, to determine wholesale prices, classify the products according to the Harmonized System code, and verify, by direct inspection, the quality, quantity, and specifications of the goods. Unfortunately, HCV often has the effect of overstating the value of the products, and, as a result, leads to the assessment of excessive duties and ultimately, higher wholesale prices on imported goods.

...Trade Policy and Market Updates

Bulgaria Manipulates Export Tax Policy to Support and Stimulate Domestic Sunflowerseed Production

Bulgaria allowed duty-free export of sunflowerseed oil from Jan. 1, 1995 to April 1, 1995, causing their exports of sunflowerseed oil to rise to 25,000 tons in the first quarter 1995, thus, exports for the quarter came within 1,800 tons of the export level for 1994. Beginning in April, export taxes for refined and crude sunflowerseed oil were set at \$285/ton and \$300/ton, respectively, to ensure that supplies are adequate for domestic utilization.

Kenya Lifts Import Ban On Wheat and Corn

The Kenyan government announced that the import ban and variable import duties on soft wheat and corn would be lifted at the beginning of the 1995/96 fiscal year. The lifting of the ban follows criticism from the World Bank and foreign donors that Kenya was backtracking on its economic liberalization plans. The ban which was put in place on April 5, 1995, was to remain in place for 6 months in an effort to reduce excess grain stocks. The variable import duty, which was implemented in early 1993 when Kenya privatized its grain imports, will be replaced by a new duty structure. Details on this duty structure have been released. Although the United States does not traditionally sell soft wheat to Kenya, the United States has been a significant supplier of hard wheat and corn to Kenya in the past. In 1993/94, the United States supplied 400,000 tons, or 75 percent, of Kenyan wheat imports and 100,000 tons, or 11 percent, of Kenyan corn imports.

Norway's Lifting of Wax Ban to Benefit U.S. Apples and Pears

In compliance with its World Trade Organization obligations, Norway is repealing a ban on the import of waxed apples and pears. Exports of U.S. apples and pears to Norway have fallen steadily since the wax ban was introduced in 1990 --apples exports dropped from 5,865 tons in 1990 to 291 tons in 1994 while pear exports dropped from 1,316 tons in 1990 to 55 tons in 1990. Although the lifting of the wax prohibition is positive news for U.S. exporters, imported apples and pears will be subject to new tariffs, as a result of the Uruguay Round, which replace quantity and licensing restrictions. Norway's new tariff on imported apples will be 4.83 Kroner per kilogram and 4.41 Kroner per kilogram for pears. In addition, U.S. fruit is expected to face increased competition from Generalized System of Preference (GSP) countries, such as Argentina and Chile, which can export fruit to Norway at a reduced duty rate.

Korean Customs Reverses Tariff Ruling on Edge-Glued Lumber

FAS/Washington and FAS/Seoul, in cooperation with U.S. Customs, were successful recently in convincing the Korean Customs Service to reverse a 1994 customs ruling which had reclassified edge-glued lumber into a substantially higher tariff category (15 percent versus 5 percent). Korean Customs reversed the ruling on May 8, 1995, following a decision by the World Customs Organization supporting U.S. industry's argument that the product had been improperly reclassified. Shipments of U.S. edge-glued lumber to Korea have picked up substantially in recent weeks, and are running at or above the pre-1994 level.

U.S. Exports of Agricultural, Fish & Wood Products to All Countries

Calendar Years 1990 to 1995 and Year-to-Date Comparisons (\$1,000)

| Product | Calendar Years | | | | | January-April | | % Chg |
|--|----------------|-------------|-------------|-------------|--------------|---------------|------------|--------|
| | 1990 | 1991 | 1992 | 1993 | 1994 | 1994 | 1995 | |
| Bulk Agricultural Total | 20,232,083 | 18,348,386 | 19,687,248 | 18,593,458 | 18,951,466 | 6,434,189 | 9,078,013 | 41.1% |
| Wheat | 3,839,037 | 3,292,138 | 4,449,324 | 4,664,582 | 4,056,007 | 1,310,467 | 1,568,167 | 19.7% |
| Coarse Grains | 7,036,717 | 5,722,597 | 5,736,599 | 5,000,598 | 4,731,925 | 1,556,425 | 2,312,851 | 48.6% |
| Rice | 801,527 | 753,557 | 726,072 | 771,312 | 1,010,548 | 338,170 | 328,750 | -2.8% |
| Soybeans | 3,549,508 | 3,956,443 | 4,380,402 | 4,598,746 | 4,330,427 | 1,639,282 | 2,094,315 | 27.8% |
| Cotton | 2,798,495 | 2,491,999 | 2,010,338 | 1,540,678 | 2,676,263 | 836,782 | 1,907,555 | 128.0% |
| Tobacco | 1,441,116 | 1,427,631 | 1,650,559 * | 1,306,067 | 1,302,745 | 520,270 | 590,614 | 13.5% |
| Pulses | 353,111 | 268,414 | 191,656 | 213,254 | 280,649 | 72,603 | 75,261 | 3.7% |
| Peanuts | 203,373 | 180,304 | 240,308 | 204,576 | 187,552 | 48,347 | 85,242 | 76.3% |
| Other Bulk Commodities | 209,199 | 255,304 | 301,989 | 293,645 | 375,352 | 111,844 | 115,258 | 3.1% |
| Intermediate Agricultural Total | 8,573,907 | 8,789,224 | 9,231,134 | 8,973,466 | 9,749,696 * | 3,126,845 | 4,059,804 | 29.8% |
| Wheat Flour | 182,956 | 184,256 | 184,317 | 205,729 | 211,248 | 76,717 | 93,798 | 22.3% |
| Soybean Meal | 1,005,103 | 1,155,307 | 1,294,722 | 1,132,041 | 958,920 | 349,930 | 441,903 | 26.3% |
| Soybean Oil | 312,930 | 222,126 | 376,202 | 363,897 | 525,077 | 119,457 | 426,145 | 256.7% |
| Other Vegetable Oils | 394,790 | 418,144 | 502,732 | 543,897 | 671,187 * | 173,729 | 334,181 | 92.4% |
| Feeds & Fodders (excl. pet foods) | 1,572,369 | 1,605,732 | 1,722,327 | 1,744,163 * | 1,738,454 | 585,420 | 658,987 | 12.6% |
| Live Animals | 513,783 | 686,563 * | 607,891 | 518,927 | 587,352 | 160,411 | 141,415 | -11.8% |
| Hides & Skins | 1,729,731 | 1,357,570 | 1,326,054 | 1,268,658 | 1,507,616 | 476,153 | 593,584 | 24.7% |
| Animal Fats | 428,729 | 426,824 | 515,214 | 501,702 | 598,546 | 170,763 | 264,863 | 55.1% |
| Planting Seeds | 588,723 | 671,655 | 675,011 * | 619,359 | 648,614 | 281,999 | 277,903 | -1.5% |
| Sugars, Sweeteners & Bever. Bases | 572,052 | 634,101 | 573,921 | 567,807 | 656,761 | 213,692 | 223,602 | 4.6% |
| Other Intermediate Products | 1,272,743 | 1,426,946 | 1,452,744 | 1,507,288 | 1,645,921 * | 518,573 | 603,423 | 16.4% |
| Consumer-Oriented Agricultural Total | 10,465,615 | 11,967,920 | 13,895,994 | 14,911,316 | 16,988,134 * | 5,018,032 | 5,690,978 | 13.4% |
| Snack Foods (excluding nuts) | 530,125 | 633,040 | 829,679 | 1,024,643 | 1,101,668 * | 332,545 | 308,111 | -7.3% |
| Breakfast Cereals & Pancake Mix | 157,882 | 216,802 | 219,762 | 252,993 | 291,979 * | 89,559 | 86,116 | -3.8% |
| Red Meats, Chilled/Frozen | 2,394,495 | 2,660,267 | 3,112,361 | 3,055,222 | 3,383,394 * | 1,025,714 | 1,204,148 | 17.4% |
| Red Meats, Prepared/Preserved | 135,998 | 165,101 | 181,562 | 220,038 | 253,621 * | 75,671 | 75,308 | -0.5% |
| Poultry Meat | 672,888 | 817,913 | 928,464 | 1,100,613 | 1,570,414 * | 436,509 | 598,030 | 37.0% |
| Dairy Products | 328,053 | 462,956 | 793,754 | 857,487 * | 753,257 | 257,605 | 246,055 | -4.5% |
| Eggs & Products | 101,979 | 143,367 | 139,234 | 139,438 | 164,653 | 48,081 | 47,810 | -0.6% |
| Fresh Fruit | 1,486,489 | 1,561,053 | 1,683,344 | 1,707,147 | 1,953,767 * | 534,918 | 558,329 | 4.4% |
| Fresh Vegetables | 728,648 | 832,935 | 899,624 | 985,953 | 1,046,789 * | 328,372 | 416,049 | 26.7% |
| Processed Fruit & Vegetables | 1,246,753 | 1,394,490 | 1,558,121 | 1,639,583 | 1,720,891 * | 510,290 | 613,825 | 20.3% |
| Fruit & Vegetable Juices | 375,497 | 385,414 | 461,017 | 469,517 | 543,013 * | 157,500 | 220,973 | 40.3% |
| Tree Nuts | 801,120 | 867,704 | 928,531 | 998,246 | 1,106,416 * | 340,658 | 320,639 | -5.9% |
| Wine and Beer | 266,202 | 315,756 | 369,181 | 379,301 | 532,735 * | 135,946 | 176,615 | 29.9% |
| Nursery Products & Cut Flowers | 186,741 | 201,442 | 201,321 | 209,397 * | 197,985 | 78,907 | 77,258 | -2.1% |
| Pet Foods, Dog/Cat | 244,038 | 329,772 | 399,630 | 497,621 | 577,943 * | 178,558 | 199,783 | 11.9% |
| Other Consumer-Oriented Products | 808,706 | 979,907 | 1,190,410 | 1,374,116 | 1,789,607 * | 487,196 | 541,928 | 11.2% |
| Wood Products Total | 6,481,227 | 6,429,179 | 6,741,685 | 7,281,313 * | 7,029,961 | 2,249,167 | 2,490,274 | 10.7% |
| Logs | 2,388,921 | 2,074,432 | 2,140,010 | 2,489,560 * | 2,277,981 | 713,019 | 832,737 | 16.8% |
| Lumber | 2,127,895 | 2,203,353 | 2,322,491 | 2,449,643 * | 2,428,150 | 809,231 | 850,695 | 5.1% |
| Plywood & Panel Products | 769,983 | 735,227 | 847,867 | 906,397 | 944,360 * | 311,074 | 357,429 | 14.9% |
| Other Wood Products | 1,194,428 | 1,416,167 | 1,431,317 | 1,435,714 * | 1,379,471 | 415,843 | 449,412 | 8.1% |
| Fish & Seafood Products Total (Edible) | 2,776,759 | 3,035,383 | 3,353,935 * | 2,959,086 | 3,002,265 | 934,752 | 970,279 | 3.8% |
| Salmon, Whole/Eviscerated | 666,582 | 436,975 | 681,663 | 583,060 | 518,413 | 33,963 | 35,422 | 4.3% |
| Salmon, Canned | 104,276 | 133,644 | 154,401 | 160,416 | 161,577 * | 45,562 | 53,999 | 18.5% |
| Crab & Crabmeat | 363,251 | 431,411 | 448,050 * | 417,660 | 349,136 | 245,939 | 128,328 | -47.8% |
| Surimi (fish paste) | N/A | N/A | 367,627 * | 274,322 | 318,850 | 101,241 | 142,602 | 40.9% |
| Roe & Urchin | 289,458 | 389,031 | 421,396 * | 415,319 | 408,963 | 160,292 | 215,140 | 34.2% |
| Other Edible Fish & Seafood Products | 1,353,193 | 1,644,322 * | 1,280,798 | 1,108,309 | 1,245,325 | 347,755 | 394,788 | 13.5% |
| Agricultural Product Total | 39,271,605 | 39,105,530 | 42,814,376 | 42,478,240 | 45,689,296 * | 14,579,066 | 18,828,795 | 29.1% |
| Agricultural, Fish & Wood Product Total | 48,529,591 | 48,570,092 | 52,909,996 | 52,718,639 | 55,721,522 * | 17,762,985 | 22,289,348 | 25.5% |

Note: (*) Highest export level since at least 1970; N/A = not available; NA = not applicable.

Source: Ernest Carter, tel. 720-2922, TEAD/ITP/FAS.

U.S. Exports of Agricultural, Fish & Wood Products by Major Group

Monthly and Annual Performance Indicators

| Export Values | April | | | October-April | | | Fiscal Year | | |
|------------------------------|-----------------|-------|------|-----------------|--------|------|-----------------|---------|------|
| | 1994 | 1995 | | FY '94 | FY '95 | | 1994 | 1995(f) | |
| | -- \$Billion -- | | Chg | -- \$Billion -- | | Chg | -- \$Billion -- | | Chg |
| Grains and Feeds 1/ | 1.033 | 1.299 | 26% | 8.294 | 9.823 | 18% | 13.413 | 16.0 | 19% |
| Wheat & Flour | 0.289 | 0.373 | 29% | 2.599 | 2.913 | 12% | 4.228 | 5.1 | 21% |
| Rice | 0.083 | 0.083 | 0% | 0.547 | 0.657 | 20% | 0.891 | 0.9 | 1% |
| Coarse Grains 2/ | 0.357 | 0.519 | 45% | 2.969 | 3.889 | 31% | 4.569 | 6.4 | 40% |
| Corn | 0.272 | 0.474 | 74% | 2.492 | 3.447 | 38% | 3.817 | 5.6 | 47% |
| Feeds & Fodders | 0.186 | 0.215 | 15% | 1.360 | 1.494 | 10% | 2.277 | 2.2 | -3% |
| Oilseeds and Products | 0.425 | 0.851 | 100% | 4.864 | 6.291 | 29% | 6.975 | 8.2 | 18% |
| Soybeans | 0.249 | 0.492 | 97% | 3.129 | 3.753 | 20% | 4.161 | 4.8 | 15% |
| Soybean Cakes & Meals | 0.065 | 0.116 | 80% | 0.680 | 0.718 | 6% | 1.013 | 0.9 | -11% |
| Soybean Oil | 0.019 | 0.072 | 273% | 0.247 | 0.646 | 161% | 0.433 | 0.8 | 85% |
| Other Vegetable Oils | 0.038 | 0.089 | 134% | 0.336 | 0.560 | 67% | 0.608 | N/A | N/A |
| Livestock Products | 0.526 | 0.600 | 14% | 3.567 | 4.395 | 23% | 6.320 | 6.9 | 9% |
| Red Meats | 0.288 | 0.317 | 10% | 1.792 | 2.164 | 21% | 3.206 | 3.6 | 12% |
| Hides, Skins & Furs | 0.118 | 0.135 | 14% | 0.778 | 0.980 | 26% | 1.423 | 1.6 | 12% |
| Poultry Products | 0.145 | 0.184 | 27% | 0.947 | 1.274 | 34% | 1.720 | 2.1 | 22% |
| Poultry Meat | 0.118 | 0.158 | 34% | 0.757 | 1.073 | 42% | 1.383 | N/A | N/A |
| Dairy Products | 0.056 | 0.072 | 28% | 0.533 | 0.449 | -16% | 0.832 | 0.8 | -4% |
| Unmanufactured Tobacco | 0.170 | 0.165 | -3% | 0.841 | 0.954 | 13% | 1.260 | 1.4 | 11% |
| Cotton and Linters | 0.251 | 0.443 | 77% | 1.221 | 2.662 | 118% | 2.306 | 4.0 | 73% |
| Planting Seeds | 0.041 | 0.038 | -7% | 0.464 | 0.493 | 6% | 0.619 | 0.7 | 13% |
| Horticultural Products | 0.653 | 0.704 | 8% | 4.529 | 5.384 | 19% | 8.098 | 9.4 | 16% |
| Sugar & Tropical Products | 0.149 | 0.153 | 3% | 1.150 | 1.148 | 0% | 1.928 | 2.0 | 4% |
| Wood Products 4/ | 0.549 | 0.663 | 21% | 3.963 | 4.287 | 8% | 6.946 | N/A | N/A |
| Fish and Seafood Products 4/ | 0.145 | 0.191 | 32% | 1.507 | 1.632 | 8% | 2.912 | N/A | N/A |
| Total Agriculture | 3.448 | 4.508 | 31% | 26.409 | 32.873 | 24% | 43.474 | 51.5 | 18% |
| Total Ag., Fish & Wood | 4.142 | 5.362 | 29% | 31.878 | 38.793 | 22% | 53.333 | N/A | N/A |

| Export Volumes | -- MMT-- | | Chg | -- MMT-- | | Chg | -- MMT-- | | Chg |
|------------------------------|----------|--------|------|----------|---------|------|----------|-------|-----|
| Grains and Feeds 1/ | 6.353 | 8.749 | 38% | 54.648 | 68.184 | 25% | 88.581 | N/A | N/A |
| Wheat | 1.944 | 2.320 | 19% | 19.050 | 18.732 | -2% | 31.132 | 33.0 | 6% |
| Wheat Flour | 0.083 | 0.137 | 65% | 0.604 | 0.722 | 20% | 1.037 | 1.1 | 6% |
| Rice | 0.210 | 0.297 | 41% | 1.535 | 2.426 | 58% | 2.438 | 3.0 | 23% |
| Coarse Grains 2/ | 2.942 | 4.569 | 55% | 24.986 | 36.717 | 47% | 39.845 | 58.4 | 47% |
| Corn | 2.192 | 4.190 | 91% | 20.857 | 32.578 | 56% | 33.057 | 51.5 | 56% |
| Feeds & Fodders | 0.982 | 1.251 | 27% | 7.158 | 8.146 | 14% | 11.797 | 12.4 | 5% |
| Oilseeds and Products | 1.425 | 3.262 | 129% | 17.119 | 24.070 | 41% | 24.154 | 31.1 | 29% |
| Soybeans | 0.946 | 2.197 | 132% | 12.166 | 17.068 | 40% | 16.364 | 21.8 | 33% |
| Soybean Cakes & Meals | 0.319 | 0.680 | 113% | 3.197 | 4.062 | 27% | 4.859 | 5.4 | 11% |
| Soybean Oil | 0.021 | 0.107 | 413% | 0.402 | 0.975 | 143% | 0.694 | 1.1 | 59% |
| Other Vegetable Oils | 0.047 | 0.130 | 173% | 0.481 | 0.783 | 63% | 0.849 | N/A | N/A |
| Livestock Products 3/ | 0.248 | 0.273 | 10% | 1.656 | 2.073 | 25% | 2.957 | N/A | N/A |
| Red Meats | 0.089 | 0.098 | 11% | 0.570 | 0.684 | 20% | 1.025 | 1.1 | 7% |
| Poultry Products 3/ | 0.127 | 0.161 | 27% | 0.784 | 1.109 | 42% | 1.405 | N/A | N/A |
| Poultry Meat | 0.124 | 0.158 | 28% | 0.761 | 1.083 | 42% | 1.364 | 1.8 | 32% |
| Dairy Products 3/ | 0.044 | 0.046 | 2% | 0.399 | 0.467 | 17% | 0.467 | N/A | N/A |
| Unmanufactured Tobacco | 0.022 | 0.025 | 12% | 0.129 | 0.142 | 10% | 0.196 | N/A | N/A |
| Cotton & Linters | 0.175 | 0.248 | 42% | 0.927 | 1.612 | 74% | 1.639 | 2.3 | 40% |
| Planting Seeds | 0.041 | 0.023 | -45% | 0.346 | 0.294 | -15% | 0.498 | N/A | N/A |
| Horticultural Products 3/ | 0.553 | 0.571 | 3% | 3.639 | 4.214 | 16% | 6.560 | 7.5 | 14% |
| Sugar & Tropical Products 3/ | 0.107 | 0.094 | -12% | 1.102 | 0.910 | -17% | 0.910 | N/A | N/A |
| Total Agriculture 3/ | 9.095 | 13.451 | 48% | 80.748 | 103.075 | 28% | 127.414 | 159.2 | 25% |

Notes: 1/ Includes pulses, corn gluten feed and meal; 2/ Includes corn, oats, barley, rye and sorghum; 3/ Includes only those items measured in metric tons; 4/ items not included in agricultural product totals. N/A = not available.

FY 1995 forecasts (f) are based on USDA's "Outlook for Agricultural Exports," published May 31, 1995.

U.S. Agricultural Export Value by Region

Monthly and Annual Performance Indicators

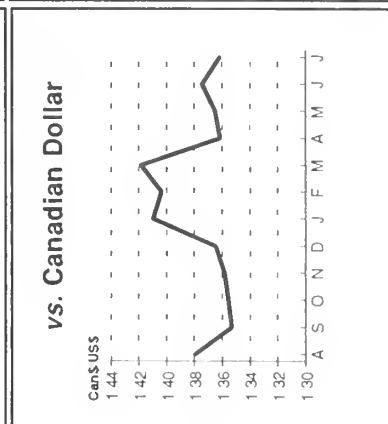
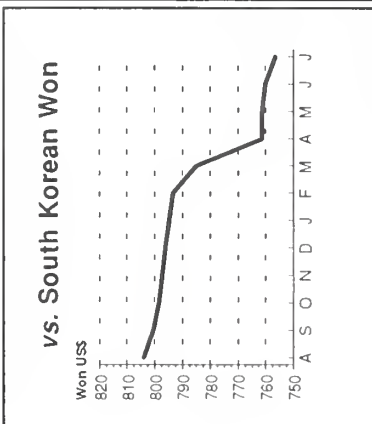
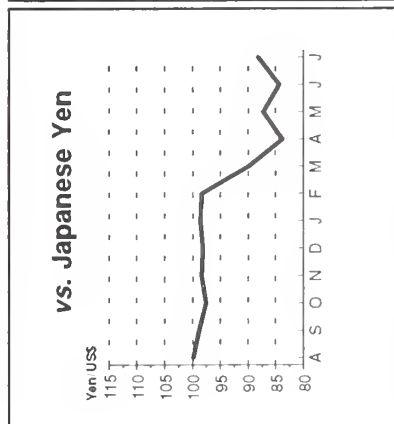
| | April | | | October-April | | | Fiscal Year | | |
|-------------------------------------|-----------------|--------------|------------|-----------------|---------------|------------|-----------------|-------------|------------|
| | 1994 | 1995 | Chg | FY '94 | FY '95 | Chg | 1994 | 1995(f) | Chg |
| | -- \$Billion -- | | | -- \$Billion -- | | | -- \$Billion -- | | |
| Western Europe | 0.488 | 0.764 | 57% | 4.789 | 5.895 | 23% | 7.013 | 8.1 | 15% |
| European Union 1/ | 0.463 | 0.733 | 58% | 4.627 | 5.671 | 23% | 6.741 | 7.8 | 16% |
| Other Western Europe | 0.025 | 0.031 | 22% | 0.162 | 0.224 | 38% | 0.272 | 0.3 | 10% |
| Central & Eastern Europe | 0.029 | 0.021 | -27% | 0.211 | 0.199 | -6% | 0.310 | 0.4 | 29% |
| Former Soviet Union | 0.083 | 0.100 | 20% | 1.094 | 0.676 | -38% | 1.474 | 1.1 | -25% |
| Russian Federation | 0.052 | 0.079 | 51% | 0.911 | 0.539 | -41% | 1.095 | 0.8 | -27% |
| Asia | 1.538 | 2.139 | 39% | 10.444 | 14.122 | 35% | 17.671 | 22.6 | 28% |
| Japan | 0.860 | 0.882 | 2% | 5.576 | 5.905 | 6% | 9.193 | 9.7 | 6% |
| China | 0.073 | 0.290 | 296% | 0.281 | 1.568 | 459% | 0.877 | 2.3 | 162% |
| Other East Asia | 0.408 | 0.642 | 57% | 3.154 | 4.383 | 39% | 5.261 | 6.8 | 29% |
| Taiwan | 0.137 | 0.193 | 40% | 1.349 | 1.466 | 9% | 2.103 | 2.3 | 9% |
| South Korea | 0.174 | 0.324 | 86% | 1.208 | 2.054 | 70% | 2.055 | 3.1 | 51% |
| Hong Kong | 0.096 | 0.125 | 30% | 0.596 | 0.859 | 44% | 1.101 | 1.5 | 36% |
| Other Asia | 0.196 | 0.324 | 65% | 1.433 | 2.266 | 58% | 2.340 | 3.7 | 58% |
| Pakistan | 0.015 | 0.030 | 100% | 0.154 | 0.316 | 105% | 0.212 | 0.4 | 88% |
| Philippines | 0.054 | 0.066 | 22% | 0.326 | 0.385 | 18% | 0.554 | 0.6 | 8% |
| Middle East | 0.100 | 0.145 | 45% | 1.038 | 1.459 | 41% | 1.650 | 2.2 | 33% |
| Israel | 0.028 | 0.021 | -25% | 0.219 | 0.253 | 15% | 0.346 | 0.5 | 44% |
| Saudi Arabia | 0.032 | 0.032 | 2% | 0.295 | 0.295 | -0% | 0.470 | 0.5 | 6% |
| Africa | 0.146 | 0.224 | 54% | 1.354 | 1.745 | 29% | 2.159 | 2.9 | 34% |
| North Africa | 0.076 | 0.159 | 109% | 0.920 | 1.280 | 39% | 1.438 | 2.1 | 46% |
| Egypt | 0.046 | 0.104 | 128% | 0.342 | 0.825 | 141% | 0.598 | 1.5 | 151% |
| Algeria | 0.022 | 0.043 | 96% | 0.416 | 0.290 | -30% | 0.592 | 0.5 | -16% |
| Sub-Saharan Africa | 0.070 | 0.065 | -6% | 0.434 | 0.465 | 7% | 0.721 | 0.8 | 11% |
| Latin America | 0.577 | 0.577 | -0% | 4.107 | 4.856 | 18% | 7.228 | 7.6 | 5% |
| Mexico | 0.337 | 0.234 | -31% | 2.228 | 2.195 | -1% | 4.126 | 3.6 | -13% |
| Other Latin America | 0.240 | 0.343 | 43% | 1.879 | 2.660 | 42% | 3.103 | 4.0 | 29% |
| Brazil | 0.014 | 0.033 | 142% | 0.153 | 0.499 | 225% | 0.227 | 0.8 | 253% |
| Venezuela | 0.035 | 0.053 | 51% | 0.264 | 0.290 | 10% | 0.401 | 0.4 | -0% |
| Canada | 0.418 | 0.482 | 15% | 2.933 | 3.374 | 15% | 5.248 | 5.9 | 12% |
| Oceania | 0.037 | 0.030 | -18% | 0.291 | 0.363 | 25% | 0.497 | 0.7 | 41% |
| World Total | 3.448 | 4.508 | 31% | 26.410 | 32.875 | 24% | 43.474 | 51.5 | 18% |

Note: 1/ EU-15 (includes the newest member states of Austria, Finland and Sweden).

FY 1995 forecasts (f) are based on USDA's "Outlook for U.S. Agricultural Exports," published May 31, 1995.

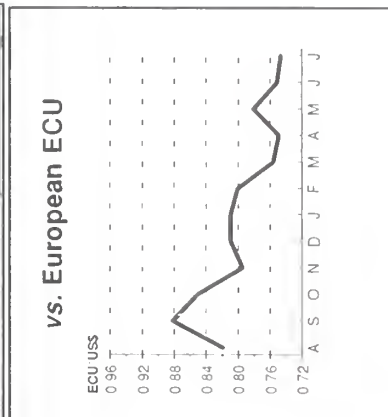
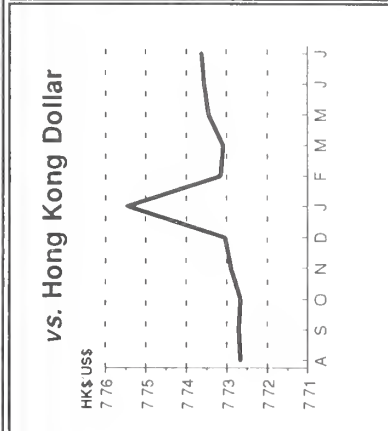
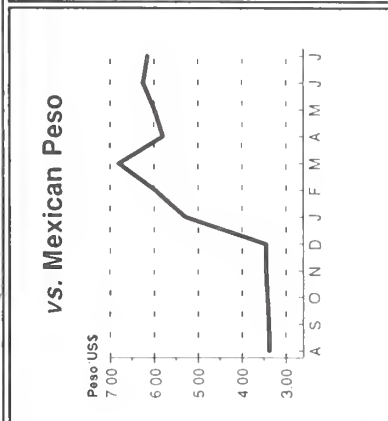
Value Of U.S. Dollar Against Major World Currencies

Daily Spot Quotations & Monthly Averages



| Currencies | Current Rate 7/20/95 | Month Ago 6/20/95 | Year Ago 7/94 | % Change Year Ago 7/94 |
|-------------------|-------------------------|----------------------|------------------|------------------------------|
| Argentine Peso | 1.00 | 1.00 | .99 | 1.01 |
| Australian Dollar | 1.3616 | 1.3815 | 1.3585 | 0.23 |
| Brazilian Real | .93 | .92 | .93 | 0.00 |
| Canadian Dollar | 1.3619 | 1.3763 | 1.3815 | -1.42 |
| Hong Kong Dollar | 7.7362 | 7.7354 | 7.7250 | 0.14 |
| Japanese Yen | 88.17 | 84.50 | 98.70 | -10.67 |
| Mexican Peso | 6.1350 | 6.2500 | 3.4005 | 69.74 |
| Taiwan Dollar | 26.38 | 25.90 | 26.58 | -0.77 |
| South Korean Won | 756.45 | 760.45 | 807.30 | -6.30 |
| European ECU | .74683 | .75369 | .81826 | -8.73 |
| -British Pound | .6268 | .6228 | .6470 | -3.12 |
| -French Franc | 4.8065 | 4.8810 | 5.3635 | -10.39 |
| -German Mark | 1.3810 | 1.3915 | 1.5630 | 11.64 |

NOTE: Exchange rates are daily spot quotes as of 3:00 PM Eastern Time, July 20, 1995.
Source: TEAD/ITP/FAS Exchange Rate Database and Wall Street Journal.



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